METHODOLOGY

Method Overview

The 2000 customer survey project included both a telephone survey and a focus group. The telephone survey was conducted with randomly-selected OFM customers in May. One focus group was conducted in June with Small Agency Client Services (SACS) client.

This report contains the findings of the telephone survey. The findings of the focus groups appear under separate cover.

Telephone Survey

Telephone methodology was selected for the 1998 baseline study, for the 1999 follow-up and for the present study. Use of the telephone allows screening to ensure that the respondent is appropriate for the study and that the interview can be completed at the convenience of the respondent.

The 1999 questionnaire was used for this survey, with one deletion and several additions:

- Several questions were added in 2000 to elicit detailed information from customers who may have been affected by the supplemental budget process during the fall of 1999. The questions asked these customers whether they believed the appeals process had or had not improved over the past several years, and how.

- Of the following four key questions first asked of executives in 1999, the third listed – that pertaining to the OFM publication, *The Ear* - was dropped from the present survey:
  1. Helping the agency understand the fit between the agency's and the Governor's priorities
  2. OFM's commitment to helping the agency succeed
  3. The value of OFM's publication, *The Ear*
  4. Perceptions of communication and coordination within OFM.

- In this year's survey respondents were asked, "What one or two things, if any, has OFM done over the past two years that have been of help to you or your organization?" This question replaced a slightly similar query that was asked in 1998 and 1999: "What is the one thing that OFM is doing so well that they should not consider making any change in how they do it?

Copies of both the full survey questionnaire and the executive-level questionnaire are shown in Appendix 1.

The survey sample was drawn from OFM customer lists compiled and cleaned by OFM. As in 1998 and 1999, customer lists were submitted by each OFM workgroup to represent a census of individuals who had contact with that workgroup within the previous year.

Weighting and Projectability

Managers were over-represented in the survey to ensure an adequate number for analysis. In order to report on OFM customers as a whole, the data were weighted so that managers and non-managers (all other customers) could be represented in their actual proportions in the population.

Some of the contact names in the original lists were not eligible because the individuals were no longer in the position, could not be located, or the numbers provided were no longer working. This type of ineligible individual is shown below as "% disqualified" and represent about 18% of all manager listings and 23% of all the non-manager listings. The proportion of manager disqualification is similar to 1999 (17%) while the proportion of non-manager disqualification is lower than in 1999 (41%). This year's rates are about even with 1998. (In 1999, a greater number of non-managers claimed to have no contact with OFM in the past year.)

	Managers	Non-Managers	Total
Original population	221	2,132	2,353
With telephone numbers	221	2,132	2,353
Sampled	201	650	851
Completed interviews	102	305	407
Disqualified	36	156	187
% Disqualified	17.9%	23.2%	22.0%
Adjusted population	181	1,637	1,818

As in 1998 and 1999, the adjusted population figures were used for computing the weights, which are 0.397 for managers and 1.201 for others.

The findings from the telephone survey are projectable to the adjusted population. The margin of error for the weighted total is ±4.8%. For managers, the margin of error is ±9.7%, and for others, it is ±5.6%.

Survey Response and Sample Disposition

The response to the survey was very good and comparable to 1998. The cooperation rate was 98%, meaning that 98% of all the eligible respondents who were contacted completed an interview. The proportion of calls that ended in a refusal to start or complete the interview was 2%, a very low refusal rate.

Disposition of the sample is shown in Table 1, by the total, by manager, non-manager and by each workgroup list. Six percent (6%) of those reached reported having no contact with OFM in the previous 12 months and were not interviewed. Each person reached was asked to confirm

that he or she had some type of contact with OFM in the past 12 months. If the person said "no," a further statement was read to clarify "contact" as requesting information from OFM, providing information or data to OFM, using OFM publications, or using OFM computerized financial systems such as AFRS or BDS. If the respondent said "no" again, the interview was stopped and this person was coded as "no OFM contact."

The proportion of calls ending this way is lower than the 19% reported in 1999. This may be attributed to the fact that OFM provided lists of respondents that were "well-cleaned" of those persons who had not contacted OFM in the 12 months prior to the study. The proportion of non-managers who said they had no contact with OFM in the prior 12 months is lower this year (7%) than in 1999 (22%).

The percentage of calls that ended as "unavailable/voice mail" (18%) was higher than last year. It was higher for both managers and non-managers. Whenever a voice mail was reached the third time for any one person, a message was left telling about the study and asking the potential respondent to call Gilmore Research Group at a toll-free number. If there was no response, these voice mail numbers were followed up later, along with other non-response numbers. At least eight attempts were made over the course of the survey period to reach non-response numbers.

The proportions of disconnects and numbers with "problems" remained down in 2000. This reflects the ongoing improvements OFM has made in workgroup lists since 1998.

Telephone Numbers Used:	Total	Manager	Non-Manager	Division/Workgroup Lists [1]				Cities & Towns
				Budget	Accounting	Forecast	Contracts	
	(851)	(201)	(650)	(173)	(536)	(137)	(70)	(100)
Complete interview	48%	51%	47%	55%	38%	56%	53%	61%
No contact with OFM [2]	6	4	7	2	8	9	1	11
Unavailable/ voice mail [3]	18	17	19	18	20	15	23	15
Gone for duration	1	2	1	2	2	0	3	0
No answer [3]	3	4	3	2	4	4	1	1
Refused to participate	2	1	2	2	2	2	3	3
Language barrier	0	0	0	0	0	0	0	0
Name no longer at #	15	12	16	12	19	9	13	7
Disconnected #	5	6	4	4	6	4	2	1
Problem with # [4]	*	0	*	0	*	0	0	0
Fax/modem #	1	1	*	1	*	0	1	0
Duplicate names [1]	1	2	1	2	1	1	0	1

Table 1
2000 Disposition of Sample

*Less than 0.5%
[1] Some names appeared on more than one list
[2] No contact in last 12 months
[3] After repeated attempts
[4] Menu "loop"; wrong area code; never rings

Each workgroup's list was a fairly good source of reaching customers who used their products and services, as seen in Table 2. The Budget Division list also reached Financial Systems customers and the Accounting group's list reached more Financial Systems customers than Accounting customers.

These findings are completely consistent with the 1998 survey.

% Reporting Contact in Past 12 Months	Table 2 **Relationship of Customer List to Reported Service Use**				
	Respondent's List of Origin			Cities &	
	Budget	Accounting	Forecasting	Towns	Contracts
	(96)	(202)	(77)	(61)	(37)
Financial Systems	70%	70%	5%	2%	57%
Accounting Division	53	41	10	7	54
Budget Division	96	41	26	16	68
Population and Forecasting	25	11	87	92	14
Personal Services Contracting	25	16	8	0	62
Q6: Which of these OFM product and service areas have you had contact with in the past 12 months?					